Saskatchewan
Learning

Saskatchewan Learning Prior Learning Assessment and Recognition Enhancement Funding Initiative

FINAL REPORT

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- Northlands College
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- Southeast Regional College – Engaging the Labour Market
- University of Regina, Counselling Services
- University of Regina, Faculty of Administration
- University of Saskatchewan, College of Agriculture
- University of Saskatchewan, College of Nursing

Disclaimer

While this initiative was developed under the administrative umbrella of Saskatchewan Learning, this report and the outcomes do not necessarily represent the views of all the sponsors, pilot project co-ordinators, institutions and organizations referred to in the report.

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* Originally, this project was named the Post-Secondary Education and Skills Training (PSEST) PLAR Enhancement Funding Initiative which received funding from PSEST in 2000 – 01 and 2001 – 02. Effective, April 1, 2002, PSEST was amalgamated into a new department called Saskatchewan Learning. Therefore, this project has been renamed the Saskatchewan Learning PLAR Enhancement Funding Initiative, and all subsequent references in this report will be to Saskatchewan Learning.

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EXECUTIVE SUMMARY

Following is a summary of lessons learned and best practices gleaned from the reports of the eleven Pilot Projects participating in the Saskatchewan Learning Prior Learning Assessment and Recognition (PLAR) Enhancement Funding Initiative. The lessons learned and best practices are included to provide you with an understanding of some of the challenges encountered within a wide array of initiatives. The common themes arising from the responses of the Pilot Project Respondents are summarized in the table below.

LESSONS LEARNED	BEST PRACTICES
PLANNING AND GOAL SETTING	
Inexperience can result in broad or vague goals and unrealistic timelines	Gain expert advice early on to gain insight for developing a realistic action plan, with flexibility to respond to unexpected events
Tracking progress can be challenging if milestones are not mapped out ahead of time	Build a plan of action including multiple steps (milestones); understand that glitches can occur along the way – undertake a pilot to identify any necessary modifications prior to broad distribution
Unexpected delays can result from time-consuming endeavours to build internal understanding and expertise	Plan up-front time for awareness building and professional development; pull in external, relevant expertise to expedite the process
Disillusionment and resistance can result if people feel their expectations were not met and their individual priorities not considered	Clearly articulate roles and expectations during the planning process, while allowing for feedback
SEAMLESS INTEGRATION	
If participants do not perceive value in PLAR, they may not involve themselves in activities, especially if they see involvement as optional	Incorporating PLAR into a program calendar and course outlines normalizes processes for participants
Courses may appear disjointed and fragmented if each one is developed individually	Explore options for complementing and building on previous courses when developing PLAR processes (e.g., prerequisites and their companion courses)
Not all curricula are developed with clearly defined learning outcomes; to incorporate PLAR assessments into courses can require extra steps	Develop curricula with clearly articulated learning outcomes based on reflection of the desired development of students – integrating values, philosophy, etc. in addition to skills

STAKEHOLDER INVOLVEMENT

Lack of input into process can result in resistance or possibly opposition	Consult early and often to gain broad support and increase stakeholder buy-in
Lack of awareness of PLAR (processes, challenges and benefits) can result in initial reluctance and resistance	Educate as you consult; use language appropriate for the audience to disseminate information and build awareness and support
External partners may be sceptical or cynical of PLAR processes	Involve external partners in the process and keep them posted on developments
Scheduling and other factors can affect the level of achievement of initiatives	Consulting with relevant stakeholders gives advance notice of potential external factors that could have negatively affected the optimal realization of an initiative

MAXIMIZING INVESTMENT

Funding is limited which can reduce access to human and material resources	Funding can assist with hard costs of initiatives, which may not be available in institutional budgets; in-kind contributions help make the most of existing resources
Developing original materials can be time-consuming; however relevant materials and resources can be difficult to access	Build on existing materials and adapt them to fit institutional contexts helps maximize initial investments; access to existing models and tools will enable greater results without 'reinventing the wheel'

WELCOME CHALLENGES AND LEARNING

Change is difficult and undertaking new, innovative initiatives can cause challenges. Adults with experience in their field may be reluctant to take on new learning	Lifelong learning is at the center of PLAR. Anyone undertaking a new or innovative initiative will experience a learning curve and will become an "adult learner"
Individuals may be hesitant to take on new initiatives that could involve risks. When outcomes may not result according to plan, people may feel that they have "failed"; there is a narrow definition of success	Initiatives may be implemented exactly as planned or not, and still be considered successful. Indeed, valuable insight can be gained through reflection and identification of significant learning, especially from challenging experiences

RECOGNIZING EXPERTISE

Champions take on new initiatives in addition to their current priorities	Recognize the contribution of champions
We are often unaware of local materials and resources	Sharing materials for others to build upon and learn from. A central location will increase awareness of and access to resources
Information streams are sometimes unclear and limited professional development for advisors and assessors can cause inefficiencies	Recognize importance of skilful advising and assessing; clear referral pathways and credible assessment

COMMUNITY OF PRACTICE

Undertaking PLAR activities in addition to existing responsibilities can present challenges, especially if those involved are experiencing a steep learning curve	Develop and/or offer professional development opportunities to provide opportunities to exchange, explore and expand on PLAR concepts, principles and strategies [1]
Many curricula are developed to include content based learning objectives which are often difficult to challenge	The development of curricula would ideally be undertaken by content experts with training in development of clear learning outcomes that identify performance indicators of the required knowledge, skills and abilities
Feelings of isolation and lack of support can impact a project and slow down or paralyse progress	Create support network with others in the field of practice
If only one individual within an organization possesses the understanding and expertise and that individual leaves, their professional memory is lost to the organization	Establish a pool of expertise from which an institution can draw, increasing sustainability of programs and processes through succession planning

SOUND ASSESSMENT

Negative perception of the PLAR Assessment process can affect opportunities for learners upon completion of the assessment	Establish transparent, rigorous, reliable and valid assessment processes, considering principles for sound assessment (e.g., inter-rater reliability, etc.)
Ambiguous learning goals and objectives can complicate the challenge process and inhibit successful implementation	Clearly defined learning outcomes can facilitate the challenge process for the assessor as well as the candidate; the candidate is aware of expectations

[1] Also see Angie Wong (2000). *University Level Prior Learning Assessment and Recognition: Building Capacity for Institutional Response.* University of Saskatchewan; Saskatoon.

Students may not be able to successfully challenge the PLAR if the assessment tool does not appropriately assess knowledge, skills and attitudes	Ensure that the assessment processes (challenge methods) are relevant and flexible to adequately assess candidate knowledge, skills and attitudes, while maintaining educational standards

Understanding lessons learned and best practices provides a reference for future undertakings. It is anticipated that the learnings of these initiatives will inform subsequent advancements in the PLAR field. The body of the Saskatchewan Learning PLAR Enhancement Funding Initiative: Final Report presents additional detail on these lessons learned and best practices, as well as an overview of the Pilot Projects, followed by a discussion of considerations and conclusions. The contributions of the Respondents to this Final Report are invaluable.

1 INTRODUCTION

In autumn 2000 Saskatchewan Learning launched a Prior Learning Assessment and Recognition (PLAR) Enhancement Funding Initiative. This initiative provided funding to eleven Pilot Projects undertaken in various sectors of the post-secondary learning system (Universities, Saskatchewan Institute of Applied Science and Technology (SIAST), Regional Colleges, Aboriginal Educational Institutions and a Private Vocational School). The funding was designed to support capacity building initiatives within the Saskatchewan post-secondary learning sector. The following criteria were used as a basis for approval of the Pilot Projects:

1) demonstration of institutional readiness to "action" PLAR;
2) a project work plan or description; and
3) project outcomes enhanced long-term capacity building for PLAR in the institution/province.

Pilot Projects were initiated by approaching individuals within post-secondary institutions who had existing experience with or understanding of PLAR. These contacts were asked to identify others who could also be interested in pursuing Pilot Projects. Several of the PLAR champions involved in these eleven Pilot Projects were building on their previous experience in earlier pilot projects. Indeed, some programs at the University of Regina and the University of Saskatchewan had participated in the Saskatchewan Universities PLAR Project (1998-99)[2]. Building upon these earlier pilot projects enables the advancement of understanding and capacity in the field of PLAR.

The eleven Pilot Projects undertaken throughout the province comprise a range of activities geared toward building capacity in PLAR. The activities undertaken include creating PLAR assessment tools, developing a database for PLAR-Ready courses, designing and delivering portfolio development processes, and undertaking portfolio assessments. Additional information on the Pilot Projects can be found in the Saskatchewan Learning Prior Learning Assessment and Recognition (PLAR) Enhancement Funding Initiative: Progress Report[3] (hereafter referred to as the 'Progress Report'). Since the completion of the Progress Report many processes, materials and tools developed as part of the Pilot Projects have been successfully implemented. Other processes, materials, and tools are still undergoing discussion and refinement.

To support capacity building initiatives in the field of PLAR, Saskatchewan Learning disbursed $30,000 dollars in the 2000 fiscal year and $30,000 in the 2001 fiscal year for the Pilot Projects. Each Pilot Project was provided $5,000 dollars to support the development of the PLAR Enhancement Initiatives, with the exception of one. This Pilot Project received an additional $5,000 to offset the costs for the technological requirements of the development of an online database of PLAR-Ready courses. The background to these initiatives is detailed in the Progress Report.

As outlined in the Progress Report:

> "When PSEST [now Saskatchewan Learning] allocated funding for the PLAR Enhancement Funding Initiative, an opportunity to partner with the

[2] See Wong (2000) for further information on the Saskatchewan Universities PLAR Project

[3] Saskatchewan Learning Prior Learning Assessment and Recognition Funding Enhancement Initiative: a progress report March 2002.

> Saskatchewan Labour Force Development Board [SLFDB] PLAR Services Project emerged. Since the PLAR Services Project (October 2000 – March 2002) aimed to build provincial long-term capacity for PLAR services, it was agreed that a formalized link would be timely and beneficial for the advancement of PLAR in the post-secondary learning system. Subsequently, PSEST provided funding and preliminary coordination services, while the PLAR Services Project provided ongoing resource support to pilot Coordinators and led the preparation of the Progress Report and [...] Executive Summary." (Progress Report, 2002, p.4)

Whereas the Progress Report provided an overview of the background of the initiative and description of each Pilot Project, this report presents a brief overview of the Pilot Projects and an integrated synopsis of the responses to the final report questionnaire (see Appendix I) distributed in May 2002. The findings outlined in this report represent the lessons learned and best practices from an institutional perspective. Insights from the Progress Report are also included, when they provide additional illumination.

1.1 Pilot Project Overviews

The main objectives and accomplishments of the Pilot Projects are presented below.

Gabriel Dumont Institute of Native Studies and Applied Research Inc., Saskatchewan Urban Native Teacher Education Program (GDI-SUNTEP) incorporated presentation portfolios as an assessment tool for third-year students enrolled in Education Professional Studies (EPS) 215 & 225. Portfolio development and presentation were integrated as components that promote reflection and articulation of professional practice.

Northlands College developed an occupational profile for northern clerical workers and explored options for work-based clerical training through identification of gaps in learning. Gaps will be identified through interviews, job profiling and TOWES (Test of Workplace Essential Skills).

Regency College undertook a pilot to explore the option of introducing PLAR processes and practices to the hospitality/tourism management program delivered at the college.

The Saskatchewan Indian Federated College (SIFC), Department of Indian Social Work developed a PLAR assessment tool for the practicum course and completed a trial assessment of a learner portfolio. The Department is reviewing the process and exploring courses in which PLAR may provide benefit for social work students and faculty.

The Saskatchewan Indian Institute of Technologies (SIIT), Research, Planning and Development Department undertook the design and development of a PLAR needs assessment tool to determine PLAR readiness in the Home Health/Long Term Care Aide program. The tool was administered to 20 students who participated in the training program.

The Saskatchewan Institute of Applied Science and Technology (SIAST) designed and developed a database to inventory the details of PLAR-Ready courses available at SIAST programs. The database was

constructed and piloted in a test environment, and orientation sessions were delivered at SIAST campuses, where participants emphasized the potential benefits for advising, documentation and statistics. Full implementation is anticipated in Spring 2003.

Southeast Regional College, Engaging the Labour Market piloted a service at the local level to create awareness of the opportunities and benefits of PLAR. Portfolio development workshops were also delivered to local communities, enabling rural residents to recognize and articulate their knowledge, skills and abilities.

The University of Regina (U of R), Counselling Services piloted portfolio development activities for university students. This included piloting services to inform students about learning and career portfolios, assisting students with portfolio development, revising the document "Exploring Your Options at the University of Regina," producing the pilot handbook "Building Your Portfolio: A Step-By-Step Guide," and supporting U of R services with development of appropriate services and resources. Counselling Services plans to continue offering group and individual assistance with portfolio development.

The University of Regina (U of R), Faculty of Administration aimed to develop a process for evaluating prior learning through learner portfolio assessment. Professional development and awareness building activities were undertaken as part of the pilot project. A link to the Executive MBA program is currently being further explored.

The University of Saskatchewan (U of S) College of Agriculture designed and developed a self-assessment tool to enhance students' ability to identify essential employability skills. PLAR principles, processes and tools were employed for the development of this tool, which will comprise a component of an exit portfolio for Co-op students. The completion of the framework for these portfolios is anticipated for the Spring/Summer 2003.

The University of Saskatchewan (U of S), College of Nursing set out to incorporate PLAR processes for the physical assessment course in the Post-Registration Program for nurses. Also included in the Pilot Project were professional development activities for faculty. At the time of writing this report, two students had successfully challenged the course through a PLAR process.

1.2 Summary and Preamble

These eleven pilot projects reflect diverse goals, activities and outcomes within the field of PLAR. As pointed out in the Progress Report "differences among projects relates to the background and culture of the institutions, as well as the focus of the programs and their Coordinators" (p. 10). Valuable insight can be gleaned from these varied experiences and create a foundation upon which increased capacity can be built in the future.

The following Section – Reflecting on the Projects – presents a discussion of the various challenges encountered, lessons learned, and best practices. Communicating these findings enables parties interested in undertaking PLAR initiatives to benefit from and build upon the experiences of these eleven Pilot Projects.

2 REFLECTING ON THE PROJECTS

Much of the value from undertaking Pilot Projects is the increased understanding of the challenges that one may encounter and the strategies available to address these challenges. There are also valuable lessons to be gained from examining the best practices found within the Pilot Projects. By reflecting upon these Pilot Projects, we can gain useful guidance for future endeavours in order to avoid or minimize some of the challenges encountered while building on the strengths identified. The lessons learned and best practices illustrated below (Section 2.1) incorporate the insights gleaned from the various experiences in the Pilot Projects, in an attempt to create a more profound understanding of the complexities inherent within these initiatives.

2.1 LESSONS LEARNED AND BEST PRACTICES – ILLUSTRATED

One of the key outcomes of Pilot Projects is the increased understanding of planning, developing, and implementing PLAR initiatives. The lessons learned and best practices that arise through reflection on the eleven Pilot Projects provide valuable foundations for future undertakings in the area of PLAR within the context of post-secondary learning system. Many of the lessons learned and best practices reported in the responses to the questionnaire for the Final Report mirror those included in the Progress Report and in Wong (2000).

2.1.1 Planning and Goal Setting

A key step when undertaking a new initiative is the planning and goal setting process. The up-front investment can be daunting, but effective planning can facilitate the overall implementation of a project.

Having clear, achievable goals is critical for a smooth completion of any initiative. Some Pilot Project Coordinators felt that their goals were initially written too broadly, perhaps due to their lack of familiarity with the operational considerations of PLAR. Prior to embarking on their project, the tasks appeared simple, however, once they commenced work, they realized the tasks were more complex than anticipated. For several Pilot Projects, the goals and action plan were revised to reflect deliverables that were more realistic within the constraints of available time and resources. Revisions were made as the faculty / instructors / staff developed greater understanding of the application of PLAR as they began implementing initiatives. Indeed, time needs to be built into the action plan to account for professional development and awareness building activities. In a few instances, Pilot Project Coordinators gained the input of knowledgeable experts with experience in the field.

Within the planning process, another important consideration is to incorporate milestones into the work plan. By incorporating multiple milestones, participants are able to receive ongoing feedback regarding their progress. Some Pilot Project Coordinators reported that although they did not originally plan to track service delivery, they realized that this could provide valuable feedback for further development. Establishing indicators to measure progress may require additional resources (financial and human), but can provide valuable data to make ongoing planning more efficient (e.g., conduct cost/benefit analysis). The database of PLAR-Ready courses that SIAST developed as one of the Pilot Projects provides accurate and current information for documentation and statistical analysis. This will facilitate

planning by providing access to data for effective decision-making.

Respondents identified two strategies for effective planning. First, because awareness of actual time requirements increases as you complete each stage of the process, it is important to build flexibility into your work plan. When planning new and innovative projects, the timelines set out for completion of tasks should be considered informed estimates. Unforeseen glitches can result in slight setbacks, but they will not derail progress if you are able to adapt to face the new challenges. The second strategy identified is to pilot new initiatives prior to broader distribution. In this way, wrinkles can be ironed out while the project is still manageable.

Another critical element of the planning process is to clearly articulate the anticipated roles and expectations of involved parties during the planning process. When individuals feel excluded from the planning process, they may offer resistance to the initiative. Including various parties' perspectives during the planning stage can increase support of initiatives, as well as identifying potential challenges the project can encounter. By identifying these challenges, expectations can be better managed than if the anticipated outcomes are presented as certainties. When people anticipate a certain result, but that outcome is unachievable due to unforeseen circumstances, disillusionment can result. It is important to be clear, inclusive and flexible in the planning stage.

2.1.2 Seamless Integration

To integrate PLAR processes seamlessly into a course or program is a critical factor for optimizing the benefits of PLAR. PLAR processes that are in alignment with the core values and philosophical underpinnings of a program can enhance the learning for students. Many Pilot Project Coordinators felt that while it is necessary to understand external approaches to PLAR, they needed to adapt these approaches to fit within their specific learning context. In this way, a distinction between the rigor, standards and integrity of the regular program was indiscernible to faculty / instructors / staff and learners from those in a PLAR process.

One of the challenges in accomplishing this seamless integration is that it may be necessary to develop learning outcomes for courses prior to conducting a PLAR assessment. In the course of undertaking the Pilot Projects, Coordinators became aware that courses would normally require developmental work prior to being PLAR ready. Undertaking the PLAR assessments also identified learning goals and objectives that would require reworking, thus providing a feedback loop into the curriculum development of courses and programs. The processes created and incorporated into the Pilot Projects, in many programs, have been or plan to be integrated into other courses where a fit is perceived.

One example of seamless integration would be to incorporate PLAR principles in course curricula. Presenting the PLAR processes explicitly in a course outline (such as was done by GDI-SUNTEP) including samples of evidence that students would need to include during the process, creates a connection between the course requirements and the portfolio process. In this manner, the PLAR processes (in this case specifically portfolio processes) are normalized as opposed to being perceived as extra work. As an integrated component, the activities built on "work that was already being done or completed in the school placements, so that the preparation was largely organizational rather than an activity that

required a lot of materials to be generated" (GDI-SUNTEP – Final Report). By integrating portfolio processes from the start of courses, students develop comfort with the process so that upon completion of a course they are adept at articulating their learning.

Another example of integrating PLAR into the normal functioning of an institution is the database of PLAR-Ready courses at SIAST. The database creates a seamless connection between student counsellors or advisors and PLAR opportunities. If a student would like to challenge a course, they will be able to obtain information on which courses are PLAR-Ready, which challenge methods are available and what the corresponding fees will be. Then, when a course is challenged, this information is fed into the database. The creation of a database of PLAR-Ready courses across the SIAST system (four campuses) increases the capacity to deliver PLAR services through the province.

Another challenge when implementing PLAR processes is to ensure that courses that build on one another are indeed complementary; PLAR processes can help identify where the learning from one course is disjointed from the next. Through development of clear learning outcomes, and by exploring options for building on previous learning, prerequisites will have clear links to the subsequent courses.

2.1.3 Stakeholder Involvement

Stakeholder involvement plays an important role in increasing buy-in and support of new initiatives. As previously stated in Section 2.1.1, people are more likely to support initiatives if they feel that they had input to the process and that their input was considered.

One of the key steps in stakeholder involvement is awareness building, as participants need to understand the concept for which they will provide feedback. This requires that information be presented in accessible terminology and in an appropriate format. If the stakeholders are kept informed during the consultation process, the input they provide can be enhanced. Understanding the potential interests of the target audience also enables development and delivery of relevant awareness building activities including effective materials.

For the development of a holistic process, multiple stakeholder involvement is beneficial. The Saskatchewan Indian Institute of Technologies Pilot Project Coordinator stated that in a First Nations environment, the involvement of elders and community leaders can provide valuable guidance for a project. The support of the elders and community leaders may be essential for the successful implementation of a project, as these individuals usually play key roles in the process and in target communities. Those involved in the Pilot Project at the Saskatchewan Indian Federated College also identified the inclusion of all stakeholders in the planning, design, development and implementation of any project is essential. In addition, if you encounter some initial opposition, you may be encouraged to respond to criticism which enables you to improve the project overall. As stated in the Progress Report "sometimes by raising difficult questions, the critic can help develop thoughtful strategies that avoid problems in the long run" (p. 48). By involving multiple stakeholders early in the process, we can gain support and buy-in, as well as increased insight.

Involving external stakeholders in the overall process also provides valuable input to the process, as well as offering

recognition of the contribution they make. For example, the GDI-SUNTEP Pilot Project emphasized the importance of involving the participating classroom teachers in the process. In this way, all stakeholders, "teachers, students, faculty advisors and EPS instructors are able to work together to strengthen the PD cycle and associated skills over the course of the Pre-internship and in preparation for the Internship." The involvement of the participating teachers also demonstrates the "recognition of the importance of the co-operating teachers' role in students' readiness for internship." By involving the external partners early in the process, they will gain a deeper understanding of the process and the benefits to themselves and learners. In addition, if you are anticipating people to provide feedback in a certain format, it is beneficial to orient them to the relevant tools and clarify expectations ahead of time.

2.1.4 Maximizing Investment

Because funding for initiatives is limited, efficient use of available funds is essential. Limited funding can affect the availability of human as well as material resources to undertake new projects. Reducing redundancy and increasing the potential benefits of any individual development are some strategies to increase efficiency and maximize investments.

Many Pilot Projects identified limited human resources as a key challenge they face when attempting to implement new initiatives. The University of Saskatchewan, College of Nursing Pilot Project Coordinator identified the workload of faculty as something they considered when undertaking the Pilot Project, as the work of revising the specified course to make the course PLAR-ready was in addition to regular workload for the faculty involved.

The Pilot Project Coordinator reported that "implementation of PLAR is expensive and time consuming for the Colleges involved and for Student and Enrolment Services Division. If implementation of PLAR is to be done, there needs to be funding for the time and services offered." Support in the form of "time release, assistance with expressing learning outcomes and how to measure the learning, and identification of appropriate strategies for students to document learning for a particular course" will greatly enhance the process.

Extensive in-kind contributions were made within all institutions undertaking the Pilot Projects. Faculty / instructors / staff were involved in activities such as material development, delivering workshops, documentation, attending and presenting at conferences, professional development, advising and assessing learners, research, etc. Reported in-kind contributions ranged from two to six times the monies received. The financial support was primarily used for hard costs for which monies did not currently exist in the budget. The in-kind contributions often consisted of person hours, although some Pilot Projects also included matching funds. The Pilot Projects were achievable based on the commitment of the champions and participants. Nevertheless, the system is not sustainable without recognition and compensation for the contributions made.

One strategy to increase the return on investment is by exchanging ideas and resources, and collaborating whenever possible. Materials and expertise may be limited or difficult to access; building on existing resources and identifying local expertise can increase efficiencies. Most Pilot Projects built on existing materials that they came upon, adapting them to suit their context. Several Pilot Projects built on

material and training provided to them from the SLFDB – PLAR Services Project. Others searched for relevant resources, both human and material. Some examples of the resources identified by the Pilot Project Coordinators include:

a) Gabriel Dumont Institute: Saskatchewan Urban Native Teacher Education Program (GDI-SUNTEP) built on the expertise provided by the Saskatchewan Learning PLAR Analyst. They also attended professional development workshops, such as the SLFDB-PLAR mini-session focused on PLAR Applications for an Aboriginal Model of Holistic Learning, led by Diane Hill of the First Nations Technical Institute (FNTI) in Ontario. They also used materials developed by the Phi Delta Kappa Centre for Professional Development as a foundation.
b) Northlands College built the clerical job profile based on Human Resources Development Canada (HRDC) Essential Skills.
c) The University of Saskatchewan, College of Agriculture developed materials (to assist students with development of a learning inventory) based on material developed by the University of Guelph and Daihousie University.

The Pilot Project Coordinators emphasized the importance of access to information and resources on PLAR for undertaking initiatives effectively with limited funding. A centralized information infrastructure and an effective means for exchanging ideas were identified as key priorities at the PLAR Forum held in April 2002 and echoed at the SLFDB Recognition of Prior Learning (RPL) Forum (October 2002). To facilitate the dissemination of tools and models developed in Saskatchewan, examples of materials developed are included at the end of this report (See Appendices II-VI).

2.1.5 Welcome Challenges and Learning

PLAR processes relate to identifying learning that occurs within a range of experiences and reflecting on this learning. As stated by a Pilot Project Respondent in the Progress Report, PLAR focuses "on the positive, looking with a 'strengths perspective'. Students are not to feel bad about weaknesses, but to see them as gaps in knowledge (Initial Advisor)" (Progress Report, p. 19). By focusing on strengths, all experiences have inherent value; even when a project does not achieve its initial intent, valuable learning can still result. By reflecting on the challenges encountered and strategies that may (or may not) have worked to overcome these challenges, we can gain insight for future undertakings.

This principle also relates to the development of PLAR tools and processes, as they may evolve and undergo several revisions over time, as new information is required. Although key components may remain constant, tools and materials developed may require modifications as awareness increases. Furthermore, as understanding increased, so too did the recognition of additional applications of PLAR processes. For example, the GDI-SUNTEP Pilot Project Coordinator reported that:

> "We feel that the project objectives were met and that this initial experience with presentation portfolios was excellent. Over the course of the semester the way we understood presentation portfolios developed and evolved, as we have learned more, we can see other

possibilities. This has been a good learning experience for us all."

The process of reflecting on the learning is also identified as a key element of PLAR practice, for use as a developmental and/or assessment tool. Within various Pilot Projects, students were provided with opportunities to develop proficiency in reflecting on and articulating learning as a formative process. Resources used to assist students in compiling and analyzing their ability to achieve identified learning outcomes include reflective journals, learning inventories, and portfolios. Following involvement in this formative process, the learners were better equipped to succeed in the assessment phase. The participants in the portfolio process were not only able to clearly articulate their learning, but they were able to articulate it using appropriate technical terminology while naturally integrating philosophical and value statements.

Several Pilot Project Coordinators identified their increased knowledge and understanding of PLAR as a valuable outcome of participating in these initiatives. The champions of these Pilot Projects became learners within this process. As the U of S, College of Agriculture Respondent "identified one of the key accomplishments of being involved in the process was enhancing her ability to articulate elements/concepts of PLAR. Following the development and implementation of this project, the Coordinator is better able to articulate learning (knowledge and skills) and to reconceptualize PLAR processes and tools (develop a matrix of PLAR). Another accomplishment identified by the Coordinator is the increased confidence and skills to take on PLAR" (Progress Report, p. 32).

Several respondents pointed out that a best practice is to model PLAR principles for others to emulate. This modelling would be undertaken in addition to incorporating PLAR principles into processes, materials and assessment tools. For several champions, a philosophical shift occurred as they developed more profound understanding of PLAR – moving from a traditional approach to teaching and testing to a more holistic understanding of learning and assessment. This shift may be difficult to express, but more readily modelled. The Pilot Project Coordinator at the University of Saskatchewan, College of Agriculture underscored the inherent value in modelling desired behaviour, because through modelling, faculty members can pass on desired skills, knowledge and attitudes that they wish to instil in their students.

2.1.6 Recognizing Expertise

Recognition plays a central role in PLAR, as individuals' prior learning is systematically assessed and recognized. Nevertheless, recognition of the accomplishments of the numerous contributors and experts in the field of PLAR is perhaps less prominent than it deserves to be. Acknowledgement of local expertise is an integral component to the development of an efficient and effective PLAR system. Furthermore, it is imperative to show appreciation of the commitment and achievements of the numerous participants in the process, lest their motivation diminish. Motivation is more likely to thrive in a positive, supportive environment; recognizing the expertise of the various stakeholders in the process helps create such an environment.

The primary responsibility for developing the PLAR Enhancement Initiatives was borne by the Pilot Project Coordinators,

although some had the support of their colleagues or a work team. Because the Pilot Projects were undertaken in addition to their regular teaching, administrative, and/or research duties, recognition of their contribution and commitment is essential. Wong (2000) identifies "one of the biggest challenges to universities is to engage faculty and staff, whose time is already stretched severely, in PLAR-related instructional development activities. Faculty need to have appropriate tools and resources to support PLAR, and to receive assurance that they will [be] compensated or recognized for their time and effort." These sentiments were echoed among the Respondents who participated in these Pilot Projects.

Once a PLAR initiative is underway, the role of a proficient PLAR advisor and/or assessor is invaluable. The Respondent on behalf of the University of Saskatchewan, College of Nursing emphasized that:

> "The role of the PLAR advisor is very important. The background and experiences of the person (candidate) need to be carefully considered when counselling students as to whether they should proceed with their application for PLAR."

Skilful advisors can maximize efficiencies in the referral process. Candidates may believe that their experience is sufficient for a PLAR challenge, however, the role of the advisor is to work with the candidate to determine whether the learning from their experience is adequate to successfully undergo a PLAR challenge. This slight distinction between the experience and the learning arising from the experience rests at the core of PLAR. An adept advisor can assist the candidate to perceive this distinction and ensure the candidate's learning will likely fulfil the requirements of the course or program learning outcomes prior to proceeding through a PLAR assessment.

2.1.7 Community of Practice

Establishing a community of practice is an invaluable response to the challenges that stakeholders may encounter. Creating networks, participating in working groups, and delivering professional development sessions contribute to the formation of a community of practice by enabling interchange of ideas and resources across the learning system. An additional benefit of this process is the cross-fertilization of ideas that can lead to creating a common vision of PLAR.

Communities of practice can strengthen institutional capacity through their involvement in the development of clear and consistent policies and criteria. Heads of institutions, departments or programs can provide valuable leadership, by supporting champions in their undertakings and encouraging open discussion of the multiple perspectives of PLAR processes and procedures. Given their position, Heads are able to encourage a culture that fosters creation of a community of practice.

In an effort to build communities of practice several Pilot Project Coordinators participated on committees relating to PLAR. These committees were involved in advancing PLAR in the institution through activities including the development of policies and procedures for PLAR processes and course challenges. One respondent pointed out how her role on the committee was critical for ongoing developments in

PLAR, as there was often a need to gain support and acceptance at an institutional level (e.g., Registrar's office) prior to proceeding at the program/department level.

The foundations of communities of practice are established by ongoing awareness building and professional development. Acceptance of new initiatives can not be forced upon an institution, but can be engendered. "Given the anxiety expressed by many University of Saskatchewan faculty as to whether PLAR maintains academic integrity, the University and Colleges / Departments need to move slowly in implementing PLAR. It is important to first provide the wide university community with information about PLAR, what it is and what it involves." Delivering organized professional development opportunities to faculty can assist faculty / instructors / staff become comfortable with PLAR. In this regard, a key element of many of the Pilot Projects was the provision of professional development activities for faculty / instructors / staff.

An interesting realization arose in the responses of some Pilot Project Coordinators, who stated that the faculty / instructors / staff involved in new initiatives are often recently hired. Although recent hires may have some room in their schedules to take on new initiatives, they also have various competing priorities. For example, at the University level, assistant professors are undertaking steps to obtain tenure, which can place immense pressure on them to publish original research and excel in instruction. This leaves limited time and resources to commit to an initiative which will not necessarily forward their quest for tenure. Unless these multiple priorities are adequately addressed, progress on initiatives may be hampered or stalled completely. To address the challenges, new initiatives could be formally recognized, but regardless, these factors must be considered in the planning phase and appropriate strategies developed.

2.1.8 Sound Assessment

One of the challenges faced when implementing PLAR processes is to ensure the rigor and academic integrity of the assessment, while undertaking a process that is fair to the candidates. The use of credible assessment practices was a strategy identified in the Pilot Projects to reassure stakeholders that the process is fair while maintaining integrity.

As already mentioned in the section on Seamless Integration, some courses are developed with learning goals and objectives that are vague, and could be interpreted in various ways. These goals and objectives need to be translated into learning outcomes that are less ambiguous, so that the expectations of the challenge process are clear. Several Pilot Project Coordinators outlined the relationship between clear learning outcomes and the validity and reliability of results. Consistent assessment is difficult to achieve when each individual involved in the process interprets the learning objectives differently. Furthermore, transparent challenge processes, with clearly articulated learning outcomes greatly enhances the chance of a candidate successfully challenging a course or program. Or, if candidates are unable to successfully challenge the process, they can readily identify the areas for improvement.

Given the importance of the academic integrity of a PLAR assessment, Pilot Project Respondents stressed the importance of ensuring that the assessment will be seen as credible and rigorous. One strategy noted by a Respondent is to remove any potential

perception of bias in the assessment. The University of Saskatchewan, College of Nursing identified the potential impact on the credibility of results if assessors are from the same city / learning institution as the candidates. To limit perception of bias, it was suggested that assessors from different locations be called on to conduct the assessment. Inter-rater reliability also needs to be examined as a component of the assessment process, to determine the consistency of results. For the Pilot Project at the Saskatchewan Indian Institute of Technologies, to ensure that all of the candidates received the same orientation to the tool, a script was developed for the assessor to follow while undertaking the assessment.

Because many students are not familiar with PLAR processes, providing candidates with orientation to the process is an important step. Students may have the knowledge, skills and attitudes that are required to fulfil the learning outcomes, but may not be able to clearly articulate them. Working with a student to identify their skills and goals can assist the learner in beginning to conceptualize their learning in a new way. Indeed, a key element of PLAR is to build from where people are at: undertake a needs assessment, identify goals, and identify steps to achieve the goals. Working through this process with students is a key strategy to assist the candidate in achieving a successful result; in addition, this ensures the candidate is appropriately guided along referral pathways.

Well-thought out tools are another recommendation for effectively undertaking PLAR. Tools developed for assessment or developmental purposes need to be clear, relevant, and user-friendly. Some Pilot Projects developed standard protocols for portfolio assessment, based on the learning outcomes of a course. GDI-SUNTEP developed rubrics that included criteria and descriptors for the students to fill out. Following portfolio presentations by a cohort group, the Pilot Project Coordinator indicated that additional descriptors would enable students to complete the self-evaluation more effectively.

2.2 Synopsis

The lessons learned and best practices presented in the previous section represent the key elements identified by the Respondents to the Final Report Questionnaire. Additional information on factors to consider when undertaking a PLAR initiative can be found in the Progress Report (Section 4). The Progress Report identified twelve factors for success, challenges, resources and strategies. These include:

- Demands on time
- Time for learning
- Access to information and training
- Financial resources
- Planning and preparation
- Communication
- Building awareness
- Resistance to change
- Flexibility
- Champions and internal support
- Industry and employer buy-in
- Acknowledgement of Staff

Many of the lessons learned and best practices presented in this Final Report reiterate the above-mentioned factors, however from a different perspective. The lessons learned and best practices included in this report reflect a framework for addressing challenges that a champion could consider when taking on a PLAR initiative. This framework is based on concrete strategies, while encouraging an exploration of organizational culture, values, and principles.

3 CONSIDERATIONS AND CONCLUSIONS

Although there are myriad benefits to be gained from using PLAR principles and processes, up front deliberations of the potential challenges is recommended. Advantages can be accompanied by risks or disadvantages. These factors should be contemplated prior to embarking on an initiative. As we learn from previous experience, we can transfer this prior learning to our current situation. In this way, we may be able to avoid previously experienced challenges and pitfalls.

This section of the report presents factors that should be considered when undertaking a PLAR initiative, as well as presenting some key conclusions resulting from the eleven Pilot Projects.

3.1 CONSIDERATIONS

Reflecting on the Pilot Projects enables conceptualization of the variety of ways in which PLAR can be implemented in the post-secondary learning system. There are numerous potential benefits of PLAR for programs, instructors and learners, however "it is evident that ongoing exploration of PLAR concepts and processes are required to further examine the implementation of PLAR within the context of post-secondary institutions" (Progress Report, p. 47). With any new or innovative initiatives there are inherent risks as well as benefits.

Willingness to take on risks is a key characteristic of the Pilot Project Coordinators. Prior to commencing their involvement in the Pilot Projects, many of the Coordinators did not have previous experience with PLAR; they encountered a steep learning curve. In many cases, it was faith in the potential benefits of PLAR that compelled them to carry the Pilot Projects forward. Even those with experience in PLAR could not be assured that their Pilot Project would unfold as planned. For those without previous PLAR experience, embarking on this journey implied tremendous uncertainty for the Pilot Project Coordinators, as they navigated unfamiliar terrain. In spite of the potential risks, the Pilot Projects were championed, with numerous valuable results.

Managing risks can be achieved through the contemplation of the myriad potential outcomes of the initiative. Although many individuals would prefer to work in isolation and avoid any possible criticism, gaining input can increase awareness of potential pitfalls, in addition to garnering support. "By raising difficult questions, the critic can help develop thoughtful strategies that avoid problems in the long run" (Progress Report, p. 47)

Another significant outcome of the Pilot Projects is the realization that demand, readiness and a champion are necessary, although not always sufficient, conditions to move forward with an initiative. While these factors must converge for progress to occur, there must also be access to resources to support initiatives. Available human and financial resources are essential for building capacity in a field of practice. Pilot Project Coordinators who have successfully implemented their initiatives underscore the importance of ongoing support, especially in the form of human and financial resources. In many instances, tremendous in-kind contributions were made; they realize that although this can accomplish great results in the short-term, it is non-sustainable.

Indeed, through the course of the Pilot Projects, the Coordinators identified the need to access information and resources as key for undertaking such initiatives. Many

Pilot Project Coordinators adapted existing materials to suit the context of their program / organization. They also called on external expertise, when available, to expedite the learning and development process. "It is extremely beneficial to have people with a well-developed understanding of PLAR and of the specific context. GDI-SUNTEP identified Diane Hill as a good resource because she understands the challenges of working in a small organization within a large institution, as well as working within Aboriginal communities" (Progress Report, p. 15).

Establishing appropriate support systems was mentioned in the Progress Report, at the PLAR Forum (April 2002), the SLFDB-RPL Forum (October 2002) and in the Final Report Responses. Due to the diversity of the initiatives, however, there must be flexibility in the types and level of support offered to the Pilot Projects. "The PLAR Analyst observed that the level and type of support 'varied from project to project, ranging form minimal to significant support. The support provided to the Coordinators included work planning, access to resource materials, delivery of professional development workshops and solicitation of ideas" (Progress Report, p. 40). The level of support required also varied among the Pilot Projects, depending on the degree of readiness of the Pilot Project Coordinators and their colleagues.

Another consideration when undertaking new initiatives is that learning will take place for all parties involved. Pilot Project Coordinators said that by designing, developing and implementing these initiatives they increased their proficiency and knowledge of PLAR processes and principles. In addition to potentially making a large personal investment in the initiative, they were also stepping out on a limb professionally. Any new initiatives must maintain the integrity of the program.

Many of the activities highlighted in the Pilot Projects exemplify adult learning principles. Through the implementation of PLAR principles such as by developing learning portfolios, an outcome of "the pilot project was to assist students in becoming more involved in the assessment process and to develop ownership of their professional development" (Progress Report, p. 13). The focus of the learning and assessment processes moved away from a traditional teacher-centered model, to one that was more student-centered.

A Respondent for the Progress Report stated "What is required is basically a paradigm shift from a teacher-centered approach to education. Our teacher-centered approach has relied on and created a construct that learning takes place and is in the hands of authority. There is a concept that learning happens external to you, rather than being integral to the power of the individual. We are talking about a shift from that to understand that learning takes place in many ways. It democratizes the learning environment and is no longer elitist. Getting away from the elitist process is a movement from learning happens to me, to learning happens within me. Once the paradigm shift happens, they click on and whoosh! Then the question becomes how can I allow this person to show what they have learned." (Progress Report, p. 35)

Thus, through involvement in the Pilot Projects, the champions became both learners and proponents. While having access to support and resources is essential, the champions need to feel comfortable entering the unknown. The Pilot Project Coordinators believed that the potential benefits of their initiatives outweighed any

potential risks. The valuable and varied accomplishments of the Pilot Projects demonstrate that their convictions were justified.

3.2 Conclusions

This Final Report presents an overview of the Lessons Learned and Best Practices from the eleven Pilot Projects participating in the Saskatchewan Learning PLAR Enhancement Funding Initiative. A Progress Report was prepared by the SLFDB-PLAR Services Project that presented more detailed overviews of the individual Pilot Projects. This Final Report provides an overview of the key learnings arising from the Pilot Projects in an effort to advance the practice of PLAR in the province of Saskatchewan. By reflecting upon the challenges encountered by previous projects and building on the best practices identified, champions can avoid some potential pitfalls, and streamline future projects.

Although this Report primarily focuses on lessons learned and best practices, it is important to acknowledge the benefits of PLAR in the post-secondary learning system. Wong (2000) succinctly outlines some of the advantages of PLAR from a university perspective:

> "The concept and processes of PLAR presented to university faculty and staff incorporate many familiar issues in an unfamiliar form. Issues such as the characteristics of the student body and their implications for admission policies, course content and structure, modes of teaching and learning, program delivery modes and timelines, assessment procedures and the nature of evidence of learning have all been points of discussion and debate among faculty and staff. PLAR has the potential of simultaneously addressing a range of these issues under one 'umbrella'." (Wong, 2000, p.16)

Although this expresses the concept and processes of PLAR within a university context, one may also assume that similar discussions are also underway at the level of the colleges, technical institutes, and private vocational schools.

One option to make achieving these benefits more efficient is to build on the previous experience of initiatives. Future champions, like the ones undertaking the eleven Pilot Projects, will need to welcome learning and challenges. The lessons learned can contribute to establishing decision-making and planning frameworks for future endeavours. The best practices identified in this Final Report are intended to provide a foundation upon which future endeavours can build. With the information provided in this report, future champions may feel more secure in taking on the challenges of innovative initiatives.

4 PARTICIPATING INSTITUTIONS

Saskatchewan Learning gratefully acknowledges the dedicated efforts of the Pilot Project Coordinators / Team Members in undertaking and supporting their respective PLAR Enhancement Initiatives. The field of PLAR will greatly benefit from the valued leadership that has been demonstrated in these pilot projects.

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PLAR (Prior Learning Assessment and Recognition) at the University of Saskatchewan: Challenge for Credit Policy. Available at: http://www.usask.ca/university_council/acad_prog/reports/04-21-02.shtml

Saskatchewan Institute of Applied Science and Technology PLAR Policy. Available at: http://www.siast.sk.ca/policies/316.pdf

Saskatchewan Institute of Applied Science and Technology PLAR Web site. Available at: http://www.siast.sk.ca/siast/admissions/plar.htm

Saskatchewan Labour Force Development Board: Recognition of Prior Learning
Please see the following PLAR resources available at:
http://www.slfdb.com/recognition_of_prior_learning/

- The Provincial Framework
- Discussion on the Provincial RPL Framework: Oct 18 Meeting Notes
- Saskatchewan Learning Prior Learning Assessment and Recognition Report
- PLAR Project Final Report
- Portfolio Learning: The NSCC Story
- National Best Practices Workshop (October 2002 - Charlottetown)
- Diane Hill Presentation: 2001 SLFDB Conference (Hill, Diane (2001) Prior Learning Assessment and Recognition: Applications for an Aboriginal Model of Holistic Learning)

Saskatchewan Universities PLAR Project.
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APPENDIX I

PLAR Enhancement Funding Initiative
Final Report Questionnaire

Below are the four questions that Pilot Project Coordinators were asked to respond to for this report:

1. Were the goals of the pilot project achieved? Please explain.

2. If a "PLAR-related tool" was developed:

   a) Please enclose a sample of the PLAR-related tool (s).
   b) Evaluate the PLAR-related tool's effectiveness.
   c) Explain next steps for the PLAR-related tool's development or future applications.

3. Provide a breakdown (estimate) of the expenditures related to the pilot project with regard to the $5,000 allocated by the Department. (Categories include: designated personnel, professional development, travel, accommodations/meals and office supplies/telephone/photocopying/mail.) It is *optional* to attach receipts
   You may also include a breakdown and total amount of the in-kind contributions to the pilot project as well.

4. Additional Comments

APPENDIX II

Northlands College:
Sample Skills Profile
Portfolio Development Workshop Materials

Northlands College undertook the development of an occupational profile for northern clerical workers and also designed/delivered an introductory portfolio development workshop for their faculty/staff. The occupational profile instrument and PowerPoint presentation for the portfolio development workshop have been included in the Appendix.

INTRODUCTION

This occupational profile is based on interviews with job incumbents at Northlands College, the La Ronge Health Center, and Saskatchewan Environment and Resource Management. Also included, is a job profile done at McLean Lake Uranium Mine using a different profiling method (Work Keys).

Clerical Workers are responsible for recording and processing information on forms and documents and completing and sending out letters, in accordance with established procedures. They also order office supplies, receive money from clients and maintain good customer service. They are responsible for submitting month end reports as it applies to financial, human resources, and equipment. They often perform tasks for other staff handling multiple projects and tasks.

Clerical Workers identified the following as the most important Essential Skills:

- **Document use**
- **Oral communications**
- **Job Task Planning/Organizing and Decision Making**
- **Computer use**

DEFINITION OF TERMS

Complexity Level: At the end of most of the tasks is a number within brackets. This number represents the complexity level of that task. Each Essential Skill has a range within its complexity rating scale, some range from level 1-4, others from level 1-5.

Example: An example task is one that is generally performed by *most of the workers* interviewed. While the examples are not a comprehensive listing of all the duties performed by clerical workers, they do provide a picture of the nature and range of tasks performed.

The qualifier – "may": Some examples use the qualifier "may". This indicates that the task does not relate to all workers. For example, the statement "clerical workers *may* assign routine tasks to other workers" or "*may* have to communicate with vendors concerning payment inquiries", means that some, but not all, clerical workers do these tasks.

A. READING TEXT

The typical text reading tasks of Clerical Workers are at Complexity Levels 1 to 3. Their most complex text reading tasks are at Complexity Level 3.

Examples:
Clerical Workers:

- Read emails. (1)
- read internal memos which are meant to inform, ie., newsletters, procedural and policy changes, company events. (2)
- rrad letters from clients, agencies, and government departments. (2)
- read procedures, policy, orientation and other training manuals. (2)
- proof invoices, lease agreements, form letters, monthly reports for accuracy. (2)
- may proof read staff's memo's, faxes, and letters.

- read informational brochures and other reference material, such as computer manuals that are relevant to the job. (3)
- read service manuals for photocopier and fax machine. (3)
- may read and select information from various sources to use in training manuals. (4)

READING PROFILE:

Type of Text	Purpose for Reading			
	To scan for specific information/To locate information.	To skim for overall meaning, to get the gist.	To read the full text to understand or to learn.	To read the full text to critique or to evaluate.
Forms	Y			
Labels				
Notes, Letters, Memos	Y	Y		
Manuals, Specifications, Regulations	Y	Y	Y	
Reports, Books, Journals	Y	Y	Y	

B. USE OF DOCUMENTS

The typical document reading tasks of clerk's are at Complexity Levels 1 and 2. Their most complex document reading tasks are at Complexity Levels 3.

Examples:
Clerical Workers:

- may use checklists when inspecting vehicles, apartments, and when ordering supplies. (1)
- read labels on packages. (1)
- enter information onto a variety of forms such as client information forms, mailing lists and form letters. (2)
- use spreadsheet programs for entering data such as financial transactions, program, and client information. May include meeting room and vehicle bookings, and keeping staff schedules. (2)
- may read employee time sheets and schedules. (2)
- fill in forms such as purchase orders, lease agreements, and supply forms. (2)
- enter data onto database systems for the purpose of tracking programs, client activity, materials and supplies, personnel, verifying calculations and ensuring that supporting documents are attached. (3)

- read various forms that are specific to their own organization. A clerk at Northlands College might read student registration forms, PTA forms, and housing forms; a clerk working with Mental Health might read a Client Information Form or work order form; and a clerk working for SERM might read forms for purchasing a CVA, property management forms, or human resources forms. (3)

DOCUMENT USE PROFILE:

Clerical Workers:

- read signs, labels or lists.
- complete forms by marking check boxes, recording numerical information or entering words, phrases, sentences or texts of a paragraph or more.
- read completed forms containing check boxes, numerical entries, phrases, addresses, sentences or texts of a paragraph or more.
- read tables, schedules or other table-like text.
- plot information on graphs.
- create tables, schedules and other table-like text.
- enter information on tables, schedules or other table-like text.
- may file records in alphabetical or numerical order, or according to subject matter or other system

C. WRITING

The typical writing tasks of Clerical Workers are at Complexity Levels 1 and 2. Their most complex writing tasks are at Complexity Level 4.

Examples:

Clerical Workers:

- write emails, phone messages, and short notes. (1)
- may keep a journal of daily activities (write notes to remind themselves of tasks that have to be done. (1)
- communicate information to staff using standard memos, letters, forms, activity reports, tables, and charts. (2)
- may write monthly reports to supervisors and administration. (2)
- may write minutes of meetings. (2)
- may compose and write memos and/or letters to clients such as funding agencies, suppliers, government organizations, band offices. (3)
- may write "how to" training manuals for new employees. (4)

WRITING PROFILE:

Length	Purpose for Writing						
	To organise/ To remember	To keep a record/ To document	To inform/ To request information	To persuade/ To justify a request	To present an analysis or comparison	To present an evaluation or critique	To entertain
Texts requiring less than one paragraph of new text	Y	Y					
Texts rarely requiring more than one paragraph	Y	Y	Y				
Longer texts		Y	Y				

D. NUMERACY

The numeracy tasks of Clerical Workers involve:

- Money Math at Complexity Levels 1 to 3.
- Scheduling or Budgeting/Accounting Math at Complexity Levels 1 to 3.
- Data Analysis Math at Complexity Level 2.

They also perform tasks involving:

- Numerical Estimation at Complexity Level 1.

Examples:

Clerical Workers:

- may handle petty cash for miscellaneous purchases or services. (money math) (1)
- process revenues received such client payments for licenses, or student rent and tuition, provide a receipt, and record the transaction onto a database. (money math) (2)
- calculate the amount of an invoice, including taxes. (money math) (2)
- may monitor contracts/agreements to ensure financial terms are being met and expenditures are processed accordingly. (money math) (3)
- prepare and make bank deposits. (scheduling/budgeting/accounting math) (1)
- may monitor accounts or budgets and report activities when required. (scheduling /budgeting/ accounting math) (2)
- prepare a variety of bank reconciliation's. (scheduling /budgeting/ accounting math) (2)

- may audit invoices and journal vouchers including verifying calculations and ensuring that supporting documents are attached. (scheduling /budgeting/ accounting math) (3)
- may calculate retroactive pay, sick leave, seniority roster, and vacation leave entitlement. (scheduling /budgeting/ accounting math) (2)
- may compile and make simple comparisons of month and/or year end statistics for various departments or programs. (data analysis) (2)
- may estimate inventory or office supplies. (numerical estimation) (1)

MATH SKILLS PROFILE:

a. Mathematical Foundations Used

Clerical Workers use:

Number Concepts:

Whole Numbers	• Read and write, count, round off, add or subtract, multiply or divide whole numbers. For example, counting inventory.
Integers	• Read and write, count, round off, add or subtract, multiply or divide integers. For example, dealing with deficits.
Rational Numbers Fractions	• Read and write, add or subtract fractions, multiply or divide by a fraction, multiply or divide fractions. For example, prorating student apartment rent.
Rational Numbers Decimals	• Read and write, round off, add or subtract decimals, multiply or divide by a decimal, multiply or divide decimals. For example, adding payroll or bills (dollars and cents).
Equivalent Rational Numbers	• Convert between fractions and decimals or percentages, convert between decimals and percentages. For example, when calculating taxes for purchase orders

b. How Calculations Are Performed

Clerical Workers make calculations:

- using a calculator.
- using a computer
- in their heads.
- using a pen and paper.

c. Measurement Instruments Used

Clerical Workers measure:

- time – using a watch and calendar.

E. ORAL COMMUNICATION

The typical oral communication tasks of Clerical Workers are at Complexity Levels 1 and 2. Their most complex oral communication tasks are at Complexity Level 3.

Examples:
Clerical Workers:

- answer phones and greet clients. (1)
- may call contractors and cleaners to fix or replace damaged equipment or property items and to clean offices and other spaces. (1)
- make calls by phone to suppliers to obtain quotes, clarify invoice amounts, and place an order. (1)
- may have to communicate with vendors concerning payment inquiries. (2)
- discuss requests for information, accounts, negotiate payments, and discuss disagreements with clients. (2).
- receive and clarify instructions from co-workers and supervisors. (2)
- listen to voice messages and decide where to direct the messages. (2)
- assist clients with filling out forms and answering their questions. (2)
- exchange or discuss client/customer information with other staff. (2)
- present information at staff meetings. (2)
- may do work projects or committee work with other staff. (2)
- may instruct new or inexperienced staff on new processes, procedures, or software programs. (2)
- may provide answers to staff concerning general human resource procedures or refer them to the appropriate staff person. (2)
- may provide suggestions to supervisors and/or management concerning improvements in work methods, procedures, and other work-related problems. (3)
- may comfort or reassure clients who are upset or angry or negotiate work priorities with staff. (3)

Modes of Communication Used:
Clerical Workers communicate:

- in person.
- using the telephone.
- using a two-way radio (mine clerical worker).

Environmental Factors Impacting Communication:
Environmental factors impacting communication would include noise from other staff talking, telephones, client inquiries and printers. Clerical Workers often work in high traffic, busy areas.

Oral Communications: Other Information:
The Clerical Worker may be required to speak an aboriginal language.

ORAL COMMUNICATION PROFILE:

Type	To greet	To take messages	To provide/ receive information explanation direction	To seek, obtain information	To co-ordinate work with that of others	To reassure, comfort	To discuss (exchange information, opinions)	To persuade	To facilitate, animate	To instruct, instill understanding, knowledge	To negotiate resolve conflict
Listening (little or no interaction)		Y	Y								
Speaking (little or no interaction)	Y		Y								
Interact with co-workers		Y	Y	Y	Y		Y	Y		Y	Y
Interact with those you supervise or direct		Y	Y	Y	Y		Y	Y		Y	
Interact with supervisor/ manager			Y	Y	Y		Y	Y			Y
Interact with customers/ clients/ public	Y	Y	Y	Y	Y	Y	Y	Y			
Interact with suppliers, servicers			Y	Y		Y					
Participate in group discussion			Y	Y	Y		Y				
Present information to a small group			Y	Y	Y						
Present information to a large group			Y								

THINKING SKILLS

1. Problem Solving

The typical problem solving tasks of Clerical Workers are at Complexity Levels 1and 2. Their most complex problem solving tasks are at Complexity Level 2 to 3.

Examples:
Clerical Workers:

- may resolve shipping and receiving problems such as shipments not arriving, deciding who ordered the shipments, matching purchase orders and invoices to the shipments. (1)
- check operating manuals when photocopiers and fax machines stop working to identify the nature of the problem(s) and its location. (1)
- may have to resolve scheduling problems when clients are double booked, late, or show up without an appointment. (2)

- when encountering errors or inconsistencies between administrative or financial records, they check the forms and records, talk to staff and clients until the error is resolved. (2)

- locate information, records, and/or files when they are misplaced. This may involve looking in a number of places for the information and questioning staff. (2)

- adapt to procedural changes and the various ways staff may want work done. (2)

- may have to deal with clients who are upset or unhappy and want to see a counsellor, or a program coordinator, or a conservation officer. They may have to find a solution, provide additional information, and determine if it is something they can deal with. (3)

2. Decision Making

The typical decision making tasks of Clerical Workers are at Complexity Levels 1 and 2. Their most complex decision making tasks are at Complexity Level 2 and 3.

Examples:

Clerical Workers:

- may decide what to do with mail that is misplaced or inadequately addressed. (1)

- decide on the quantity and type of supplies to order and when to order them. (2)

- decide on how to set up the filing system and what codes are assigned to a file or document. (2)

- if a particular form does not fit a situation, decide what changes need to made. (2)

- may decide on furniture acquisitions, office space, small and large equipment purchases. Researches and provides answers to staff concerning purchases. (3)

- when dealing with multiple projects, prioritise workload to meet deadlines and develop solutions when deadlines cannot be met. (3)

3. Job Task Planning and Organizing

Clerical Workers plan and organize their job tasks at Complexity Level 2 and 3.

Description

Clerical Workers are responsible for planning their daily and weekly workload. They determine when the tasks will get completed although this is often impacted by multiple interruptions and unpredictable situations which arise throughout the day. They must then reassess their priorities in order to meet staff needs and deadlines. In addition, they must do longer range planning for month-end reports. Many of their daily tasks are repetitive but vary depending on requests from clients and staff.

4. Significant Use of Memory

Examples:

Clerical Workers:

- remember office procedures, such as what forms or reports need to be completed and when they are due.

- remember client names and faces so that they can greet them and make conversation.
- remember requests for information from clients and staff.
- may have to remember other clerical functions within various departments.

5. Finding Information

Clerical Worker's tasks that involve finding information are at Complexity Levels 1 and 2.

Examples:
Clerical Workers:
- look through catalogues for materials and supply information. (1)
- refer to policy and procedures manual to find information concerning tasks that need to be done or to answer requests from others. (2)
- search computer databases and files to obtain information. (2)
- may gather and clarify information when clients are filling out forms. (2)

G. WORKING WITH OTHERS

Clerical Workers mainly work independently. They may work with others to meet a deadline, to develop materials, or to make program decisions. They usually co-ordinate work with others during busy periods. Clerical Workers participate on committees and work projects developing procedures and work processes. When filling in or covering off for others, they may have to take on clerical functions within and between other departments.

Participation in Supervisory or Leadership Activities

Clerical Workers:
- participate in formal discussions about work processes or product improvement.
- have opportunities to make suggestions on improving work processes.
- may monitor the work performance of others.
- inform other workers or demonstrate to them how tasks are performed.
- orient new employees.
- may make hiring recommendations.
- select contractors and suppliers.
- may assign routine tasks to other workers.

H. COMPUTER USE

The computer use tasks of clerical workers are at Complexity Level 2 and 3.

Examples:
Clerical Workers:

- use word processing. For example, they type memos, letters, and monthly reports. (2)
- use a database. For example, they use various programs to track client and staff information and make lists. (2)
- use bookkeeping, billing and accounting software. For example, when invoicing suppliers. (2)
- use communication software. For example, they write and receive email. (2)
- use graphics software. For example, using Desk Top Publishing when putting information on the monitor display or organising training material. (2)
- use a spreadsheet. For example, they enter data into accounting systems and collect financial data (3)
- may prepare documents such as training manuals using Power Point. (3)

I. CONTINUOUS LEARNING

Clerical workers continue to learn new computer software programs as it becomes relevant to the work place. They may also take training to upgrade their job skills and to improve themselves professionally. Those who work in remote locations have difficulty accessing training and often have to rely on trial and error when learning new tasks.

How the Learning Occurs

Learning may be acquired:

- as part of regular work activity.
- from co-workers.
- through reading, Internet, or other forms of self-study, on workers own time:
- through off-site training
- during working hours at no cost to the worker.

J. OTHER INFORMATION

In addition to collecting information for this Essential Skills Profile, interviews with job incumbents also asked about the following topics.

1. Physical Aspects

Body Position
Clerical workers often sit at a desk keyboarding, walk around to the photocopier, fax machine, and to deliver mail. They also stand at the reception counter assisting clients. Clerical workers bend, crouch, and kneel when filing.

Strength
Some strength is required to lift supplies or push them on a trolley.

2. Attitudes

The clerical workers interviewed felt that they need to be open minded, patient, have good customer service and interpersonal communication skills. They also need to be attentive, prompt, out-going, flexible, calm, and a team player..

3. Future Trends Affecting Essential Skills

The clerical worker will have to keep up-to-date with software and technological change and the growing use of Internet to order supplies and other resources. There will be greater computer skills required as systems change but these are often learned on-the-job or from co-workers. Those in remote locations will have to access technology-enhanced learning to up-grade their skills. Learning Power Point seems to be a priority from those interviewed.

Portfolio Development

Northlands College

In service

October 23, 2002

Bebe Ivanochko

Objective: Provide overview of prior learning and portfolio use for adults

Portfolio Development

Challenge

How to cope with the transition from resource-based to a knowledge and skills based society.

Answer--look back at our work/volunteer life to reflect the knowledge and skills we have demonstrated AND provide documentation.

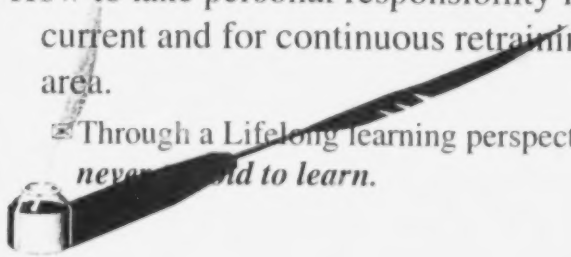
Adults seriously underestimate what they know and can do!

Portfolio Development

Challenge 2

How to take personal responsibility for keeping current and for continuous retraining in a chosen area.

- Through a Lifelong learning perspective. ***You're never [illegible]ld to learn.***



Buzz Words You May Hear

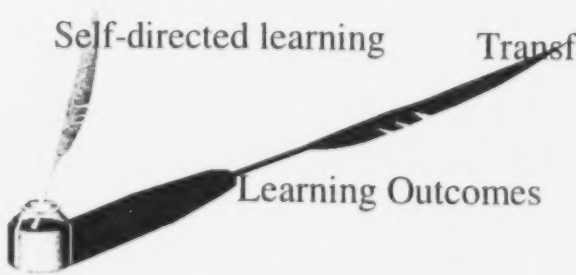
Lifelong Learning

Reflective learning

Self-directed learning

Transformation

Learning Outcomes



Portfolio Development Agenda

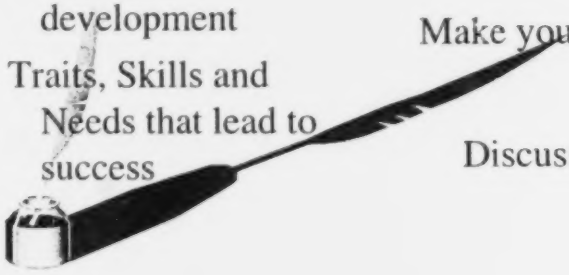
Brief history of prior learning and portfolio development

Traits, Skills and Needs that lead to success

PLR and Life Long Learning

Make your own Portfolio

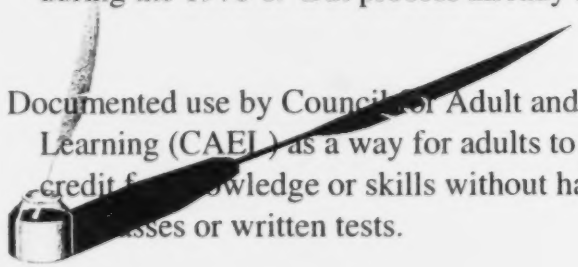
Discussion



Brief History

Prior learning recognition (PLR) and portfolio development--a process to document skills and provide educational credit initially developed in the United States during the 1970's. But process already in use before that.

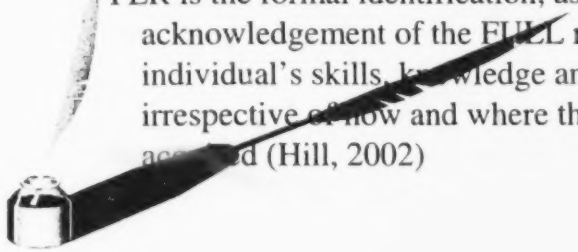
Documented use by Council for Adult and Experiential Learning (CAEL) as a way for adults to gain academic credit for knowledge or skills without having to take classes or written tests.



Brief History

Currently in use around the world as a key ingredient in education and training reform.

PLR is the formal identification, assessment and acknowledgement of the FULL range of an individual's skills, knowledge and capabilities irrespective of how and where they have been acquired (Hill, 2002)



PLR Acknowledges Your:

Skills

Competency

Knowledge

Formal

Informal

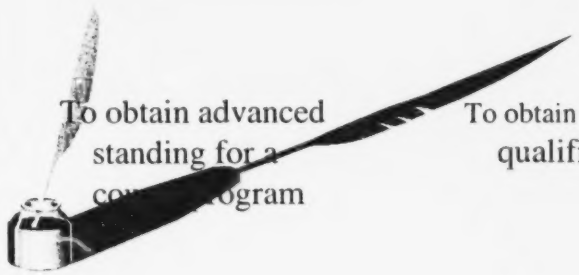
On-the-job

Life experience

Uses of PLR

By those seeking admission into further and higher education

To obtain access into learning programs



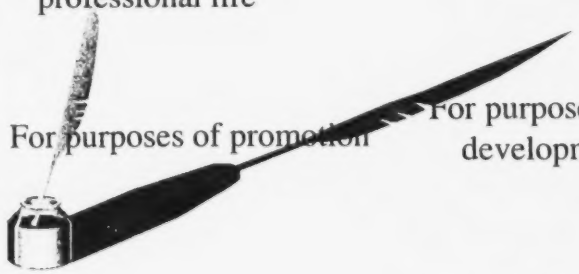
To obtain advanced standing for a course/program

To obtain credits towards a qualification

Uses of PLR cont

To seek entry into a particular field of employment or professional life

For registration with professional bodies



For purposes of promotion

For purposes of self development

Definitions of Portfolio

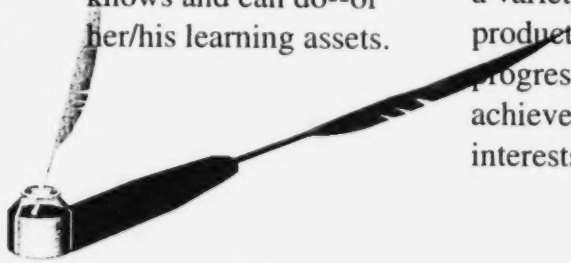
A formal document that defines the learning you acquired formally and informally through experience.

A practical way to prove that you are competent in what you do and can help identify new personal, educational and occupational goals.

Definitions of Portfolio cont.

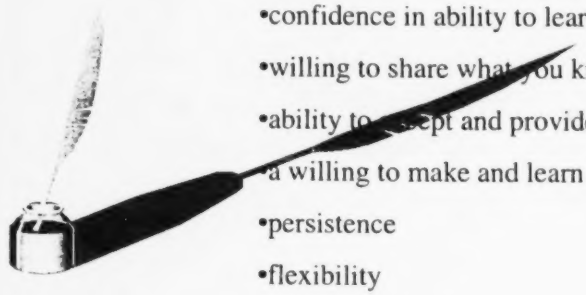
A comprehensive and diverse presentation of what an individual knows and can do--of her/his learning assets.

A thoughtful, organized, and continuous collection of a variety of authentic products that document progress, goals, efforts, achievements, talents, interests over time.



Profile of a Successful Life long Learner

- A lifelong curosity
- a motivation to learn
- personal responsibility for self-learning
- confidence in ability to learn from others
- willing to share what you know
- ability to accept and provide feedback
- a willing to make and learn from mistakes
- persistence
- flexibility



Three Types of a Portfolio

- Presentation Portfolio
- Working Portfolio
- Learning Portfolio

Three Types of a Portfolio

- **Presentation Portfolio**

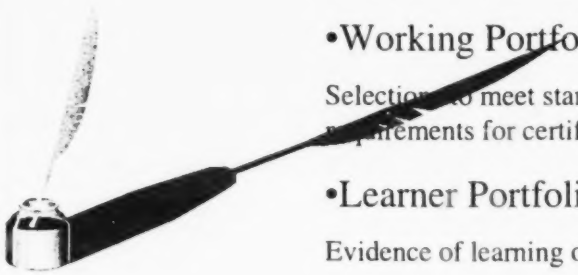
  Documents strengths, expertise, achievements

- **Working Portfolio**

  Selection to meet standards, requirements for certification/license

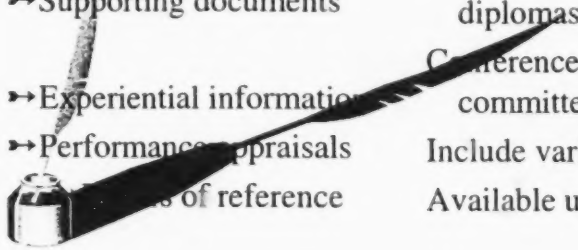
- **Learner Portfolio**

  Evidence of learning outcomes



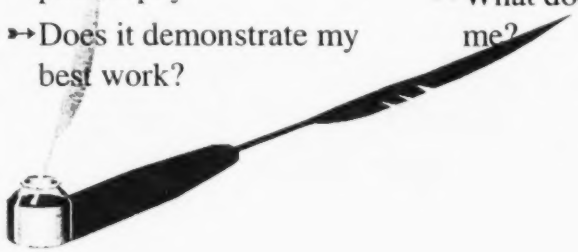
Typical Contents (include Table of Contents)

- ↣Resume — To reflect each area of your interest
- ↣Job description — Include all that apply
- ↣Supporting documents — Samples, Certificates, diplomas, tapes, video
- ↣Experiential information — Conferences, workshops, committee appointment
- ↣Performance appraisals — Include variety from past
- ↣Letters of reference — Available upon demand



Examine each item and ask???

- What does it reveal about my skills, knowledge, etc.
- Is it consistent with basic philosophy?
- Does it demonstrate my best work?
- Is it free of grammatical or mathematical errors?
- Is it AUTHENTIC?
- What does it reveal about me?



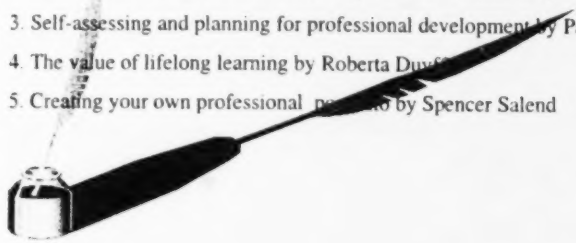
Now Make Your Own

Paired Exercise (15 minutes)

Choose an activity that you do well. Write down the process for doing that activity in five steps. Explain the significance of doing EACH step. Suggest a different documentation for each step. Share it with your partner. Get feedback. Listen to your partner's activity outline.

Bibliography

1. Learning as transformation by Diane Hill, PLAR Consultant
2. The Portfolio College by Ray Ivany
3. Provincial framework for the recognition of Prior Learning in Saskatchewan by Saskatchewan Labour Force Development Board (SLFDB)
3. Self-assessing and planning for professional development by Paschal and Jensen.
4. The value of lifelong learning by Roberta Duyff
5. Creating your own professional portfolio by Spencer Salend



APPENDIX III

Saskatchewan Indian Institute of Technologies: Overview of Materials Developed

The tools developed for the project included a multi-page questionnaire and a script.

The questionnaire was comprised of a basic checklist format that used the existing (2001) learning outcomes from each course of the HHA/LTCA program as the basis of the assessment tool. The assessment tool asked participants to identify whether they possessed the required learning outcomes prior to participating in the course and if they did, how they could demonstrate their knowledge/skill.

In addition to the questionnaire, a script was also developed to guide the assessor in conducting the interview. The script explained the purpose of the project, described what was meant by PLAR, the process of the interview (how the questionnaire would be used) and how the interview information would be stored. The script further contained space for a participant ID number (if the student consented to the interview).

APPENDIX IV

Saskatchewan Institute of Applied Science and Technology: Sample Inventory of PLAR-Ready Courses

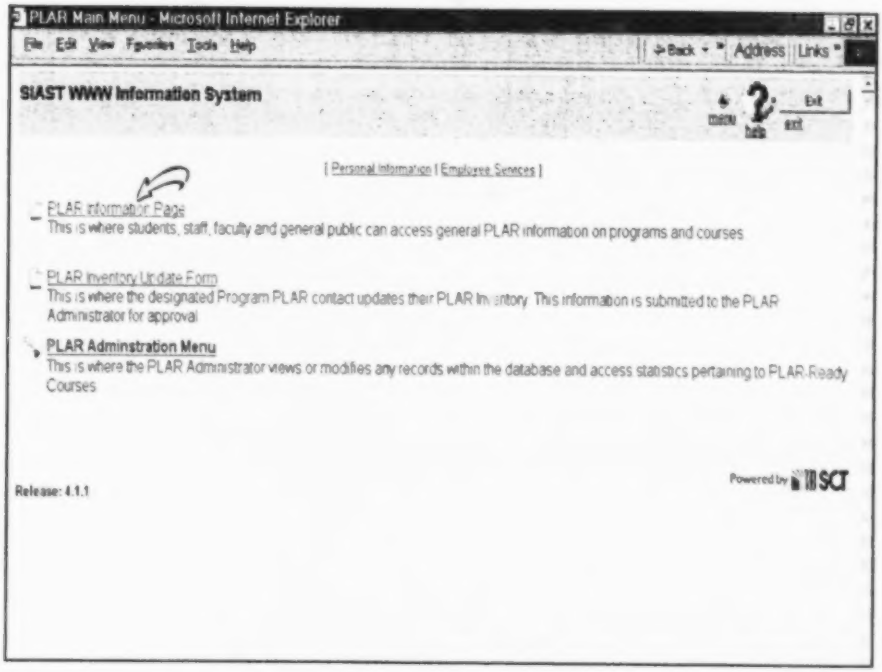
The SIAST PLAR office needed a dynamic, up-to-date database that could use automated forms and data entry. As a result, the goal of this pilot project led to the compilation of a database of all PLAR-Ready courses offered by SIAST programs. Attached in the Appendix are a selection of "screen shots" taken from the database in its current state.

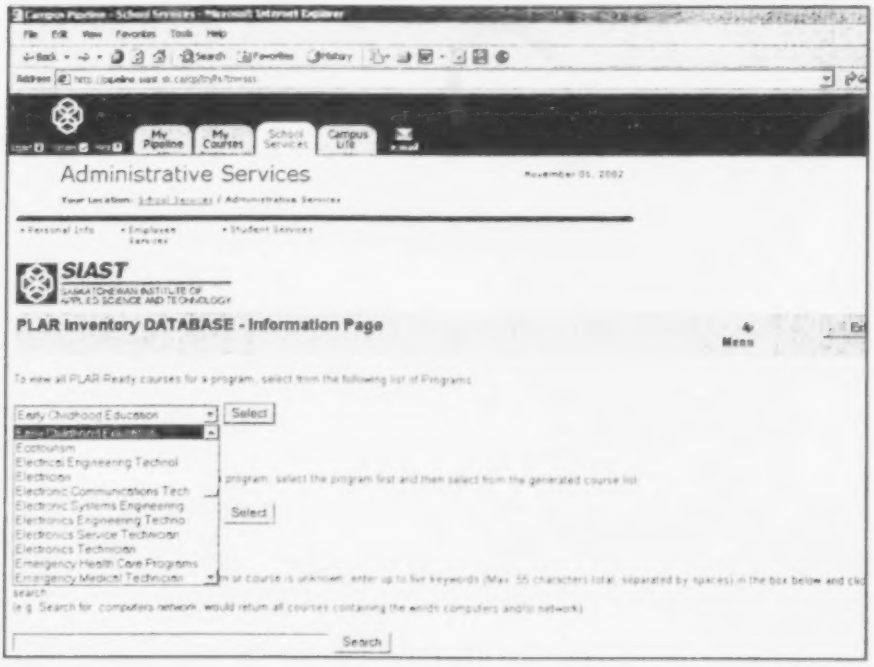
Note: All data presented in the Appendix is intended for test purposes only and is not a true representation of the actual PLAR status of any SIAST course.

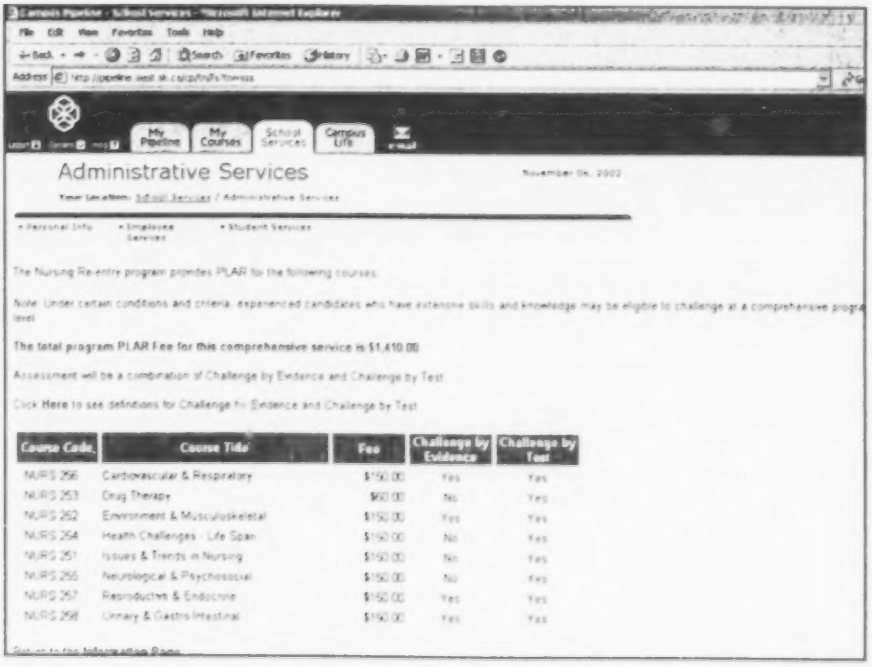
SIAST Inventory of PLAR-Ready Courses

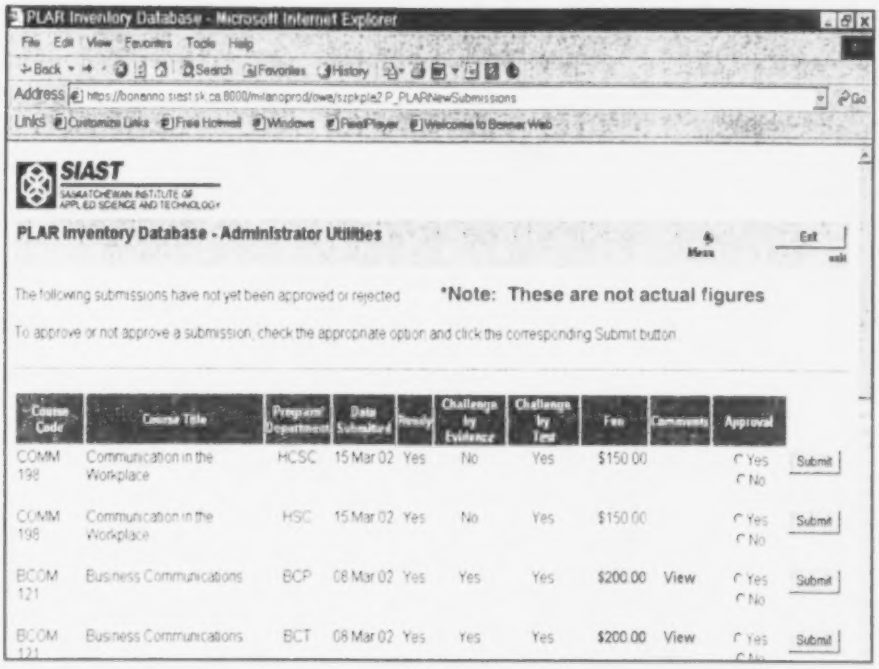
- Fall 2002
- Sample pages only!

P rior
L earning
A ssessment and
R ecognition

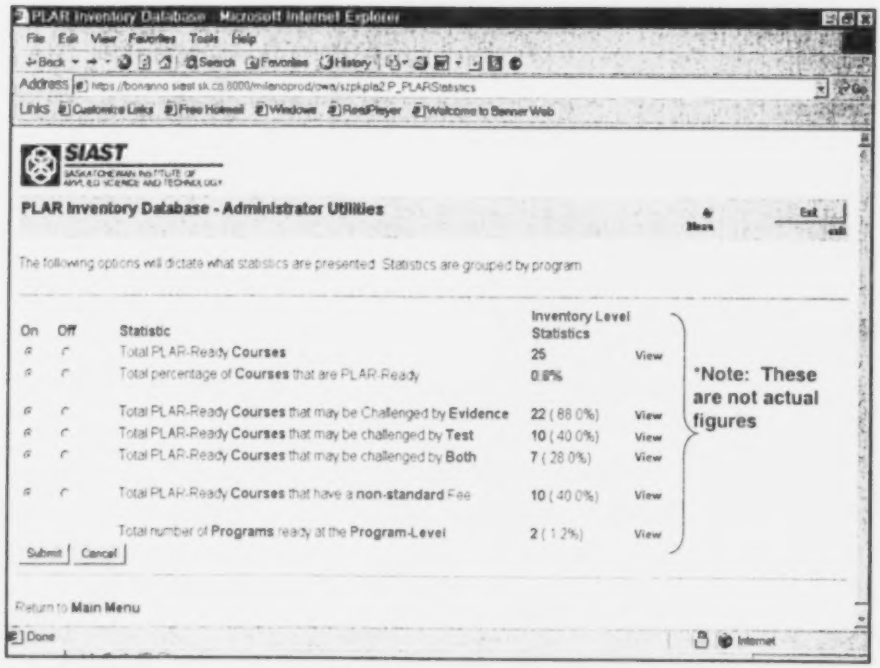

PLAR Main Menu - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back
Address
Links
SIAST WWW Information System
menu
help
Exit
exit
[Personal Information | Employee Services]
PLAR Information Page
This is where students, staff, faculty and general public can access general PLAR information on programs and courses
PLAR Inventory Update Form
This is where the designated Program PLAR contact updates their PLAR Inventory. This information is submitted to the PLAR Administrator for approval
PLAR Adminstration Menu
This is where the PLAR Administrator views or modifies any records within the database and access statistics pertaining to PLAR Ready Courses
Release: 4.1.1
Powered by SCT


Administrative Services
November 01, 2002
SIAST
PLAR Inventory DATABASE - Information Page
To view all PLAR Ready courses for a program, select from the following list of Programs
Early Childhood Education
Select
Ecotourism
Electrical Engineering Technol
Electrician
Electronic Communications Tech
Electronic Systems Engineering
Electronics Engineering Techno
Electronics Service Technician
Electronics Technician
Emergency Health Care Programs
Emergency Medical Technician
program, select the program first and then select from the generated course list
Select
search
(e.g. Search for 'computers network' would return all courses containing the words computers and/or network)
Search


Administrative Services
November 04, 2002
The Nursing Re-entry program provides PLAR for the following courses
Note: Under certain conditions and criteria, experienced candidates who have extensive skills and knowledge may be eligible to challenge at a comprehensive progra
level
The total program PLAR Fee for this comprehensive service is $1,410.00
Assessment will be a combination of Challenge by Evidence and Challenge by Test
Click Here to see definitions for Challenge by Evidence and Challenge by Test
Course Code
Course Title
Fee
Challenge by Evidence
Challenge by Test
NURS 256 Cardiovascular & Respiratory $150.00 Yes Yes
NURS 253 Drug Therapy $60.00 No Yes
NURS 252 Environment & Musculoskeletal $150.00 Yes Yes
NURS 254 Health Challenges - Life Span $150.00 No Yes
NURS 251 Issues & Trends in Nursing $150.00 No Yes
NURS 255 Neurological & Psychosocial $150.00 No Yes
NURS 257 Reproductive & Endocrine $150.00 Yes Yes
NURS 258 Urinary & Gastro-Intestinal $150.00 Yes Yes


PLAR Inventory Database - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites History
Address https://bonanno.siast.sk.ca:8000/milanoprod/owa/szpkpla2.P_PLARNewSubmissions
Links Customize Links Free Hotmail Windows RealPlayer Welcome to Banner Web
SIAST
SASKATCHEWAN INSTITUTE OF APPLIED SCIENCE AND TECHNOLOGY
PLAR Inventory Database - Administrator Utilities
Menu
Exit
The following submissions have not yet been approved or rejected
*Note: These are not actual figures
To approve or not approve a submission, check the appropriate option and click the corresponding Submit button
Course Code
Course Title
Program/ Department
Date Submitted
Ready
Challenge by Evidence
Challenge by Test
Fee
Comments
Approval
COMM 198 Communication in the Workplace HCSC 15 Mar 02 Yes No Yes $150.00 Yes No Submit
COMM 198 Communication in the Workplace HSC 15 Mar 02 Yes No Yes $150.00 Yes No Submit
BCOM 121 Business Communications BCP 08 Mar 02 Yes Yes Yes $200.00 View Yes No Submit
BCOM 121 Business Communications BCT 08 Mar 02 Yes Yes Yes $200.00 View Yes Submit

PLAR Administration Menu - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites History
Address https://bonanno.siast.sk.ca:8000/milanoprod/owa/fwgkwbis.P_GenMenu?name=hmenu.P_PLARAdminMnu
Links Customize Links Free Hotmail Windows RealPlayer Welcome to Banner Web
SIAST WWW Information System
Help
Exit
[Personal Information | Student Services & Financial Aid | Employee Services | Alumni Services]
PLAR New Submissions
PLAR Statistics
PLAR Transaction History
PLAR Exit Contacts
Release: 4.1.1
Powered by SCT


PLAR Inventory Database - Microsoft Internet Explorer
File Edit View Favorites Tools Help
Back Search Favorites History
Address https://bonanno.siast.sk.ca:8000/milenoprod/owa/szpkpla2.P_PLARStatistics
Links Customize Links Free Hotmail Windows RealPlayer Welcome to Banner Web
SIAST
SASKATCHEWAN INSTITUTE OF APPLIED SCIENCE AND TECHNOLOGY
PLAR Inventory Database - Administrator Utilities
Menu
Exit
The following options will dictate what statistics are presented. Statistics are grouped by program.
On
Off
Statistic
Inventory Level Statistics
Total PLAR-Ready Courses
25
View
Total percentage of Courses that are PLAR-Ready
0.8%
Total PLAR-Ready Courses that may be Challenged by Evidence
22 (88.0%)
View
Total PLAR-Ready Courses that may be challenged by Test
10 (40.0%)
View
Total PLAR-Ready Courses that may be challenged by Both
7 (28.0%)
View
Total PLAR-Ready Courses that have a non-standard Fee
10 (40.0%)
View
Total number of Programs ready at the Program-Level
2 (1.2%)
View
*Note: These are not actual figures
Submit
Cancel
Return to Main Menu
Done
Internet

APPENDIX V

Southeast Regional College: Sample Portfolio Development Materials

This Pilot Project provided services in the rural community for portfolio development. In the appendix are examples of materials and tools that can be used in portfolio development workshops, as well as outlining sample certificates that were used.

Materials used by Southeast Regional College in the portfolio development sessions are based on the materials and support provided by the SLFDB-PLAR Services Project. The SLFDB-PLAR Services Project also undertook development of a "PLAR Toolkit" to provide sample materials for advising, assessing, portfolio development and PLAR orientation. Additional materials are available from the "PLAR Toolkit" (available in electronic and hard copy), which can be adapted for use by institutions / organizations.

For additional information on the resources available, please contact the SLFDB at:

Phone: (306) 352-5999
Toll Free: 1-800-394-3899

You're Special:

Know Your Worth

A 2- part series sponsored by
the Whitewood Women's Network

with Denise Woznesensky of Engaging the Labour Market
and
Virginia Battiste, Whitewood Action for Families

Mon., Dec. 3 &

Mon., Dec. 10

7 p.m. @ S.E. Regional College

~ No Charge ~

Portfolios - Personal or Professional

Discover your life skills
and how they can be displayed in a
versatile record that captures the essence of
who *you* are

Sponsored by Whitewood Women's Network and Pipestone Health

Saskatchewan Labour Force Development Board
PLAR Services Project

DRAFT

Reflecting on Evidence

What does this item mean to me?

What does this item say about me?

Why have I included this item in my portfolio?

What specific skills/knowledge/attributes are reflected in this item?

How does this item relate to other activities in my life?

How does this item relate to my short/long-term goals?

In what way does this item demonstrate my strengths? weaknesses?

What is the importance of this item/activity in relation to my personal/professional growth?

What barriers or challenges did I face in realizing this (achievement), and how did I overcome them?

What were my contributions to this (activity/project)?

What was the impact of my involvement?

What were the results of this (activity/project)?

What did I learn from this?

Saskatchewan Labour Force Development Board
PLAR Services Project

DRAFT

Gathering Evidence

Education and Training

- ❑ descriptions of education/training activities (programs, courses, workshops, seminars)
- ❑ copies of certificates, diplomas, degrees, licenses
- ❑ transcripts, report cards
- ❑ teacher/instructor evaluations
- ❑ grants, loans, scholarships, awards
- ❑ artifacts from learning activities (papers, projects, reports, presentations, assignments, tests/examinations, thesis, photographs)
- ❑ statements of learning
- ❑ .....
- ❑ .....

Work Performance

- ❑ employment summary (chronological)
- ❑ summary of skills and knowledge
- ❑ job descriptions
- ❑ performance reviews/evaluations
- ❑ testimonials (letters of reference, letters of validation, citations)
- ❑ committee work (agendas, minutes, photographs, reports)
- ❑ union activities
- ❑ work products demonstrating competencies
  - reports, memos, proposals
  - items designed/created
  - technical drawings, blueprints
  - photos/videos of skill demonstration
  - organizational chart showing position, supervisory responsibilities
  - items related to computer capabilities such as sample documents, list of software applications used, competence with programming languages
  - inspection reports
  - before and after scenarios
- ❑ brochures, newsletters, annual reports, newspaper clipping
- ❑ for teachers: lesson plans, bulletin board presentations, curricula, field trips, teaching tools
- ❑ attendance records
- ❑ honours and awards
- ❑ items expressing appreciation (thank-you notes, e-mails, letters, customer satisfaction surveys)
- ❑ list of clients

- ❑ indicators of general work effort (logs of telephone calls handled, production reports, case load statistics)
- ❑ military service records
- ❑ .....
- ❑ .....

Leisure/Community Service

- ❑ list of volunteer positions held
- ❑ memorabilia from community-related activities (photographs, brochures, newsletters, speaking notes)
- ❑ products/photographs of hobbies, sports
- ❑ travel memorabilia (itinerary, tickets, photographs, diary)
- ❑ .....
- ❑ .....

Professional Development

- ❑ memberships in professional/trade associations, societies, service clubs
- ❑ memorabilia from professional development activities (conference programs, photographs, outlines of workshops/seminars)
- ❑ list of professional publications
- ❑ .....
- ❑ .....

Career Planning/Transition

- ❑ career research notes
- ❑ results from self-assessments, skills inventories

Personal Reflection

- ❑ resume (fully formatted)
- ❑ resume (text only – scannable)
- ❑ statement of goal(s)
- ❑ philosophy statement(s)
- ❑ excerpts from journals/diaries
- ❑ .....
- ❑ .....

My Evidence

Education & Training

- Descriptions of education/training activities (programs, courses, workshops, seminars)
- Copies of certificates, diplomas, degrees, licenses
- Transcripts, report cards
- Teacher/instructor evaluations
- Grants, loans, scholarships, awards
- Artifacts from learning activities (papers, projects, reports, presentations, assignments, tests/examinations, thesis, photographs)
- Statements of learning

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- Things I have gathered include:

_____

_____

_____

_____

My Evidence

Work Performance

- Employment summary (chronological)
- Summary of skills and knowledge
- Job descriptions
- Performance reviews/evaluations
- Testimonials (letters of reference, letters of validation, citations)
- Committee work (agendas, minutes, photographs, reports)
- **Work products demonstrating your abilities**
  - Reports, memos, proposals
  - items designed/created
  - technical drawings, blueprints
  - photos/videos of skill demonstration
  - organizational chart showing position, supervisory responsibilities
  - items related to computer capabilities such as sample documents,
  - list of software applications used
  - inspection reports
  - before and after scenarios
- Brochures, newsletters, annual reports, newspaper clipping
- Attendance records
- Honours and awards
- Items expressing appreciation (thank-you notes, e-mails, letters, customer satisfaction surveys)

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Things I have gathered include: _____

_____

_____

My Evidence

Leisure/Community Service

- List of volunteer positions held
- Memorabilia from community-related activities (photographs, brochures, newsletters, speaking notes)
- Products/photographs of hobbies, sports
- Travel memorabilia (itinerary, tickets, photographs, diary)

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Things I have gathered include: _____

_____

_____

Personal Reflection

- Statement of goal(s)
- Philosophy statement(s)
- Excerpts from journals/diaries

☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆☆

Things I have gathered include: _____

_____

_____

My Personal Portfolio Development

Chronological Timeline

DATE	*Life event:*

20. A project or undertaking that I am most proud of is …
21. The 'school of hard knocks' has taught me that …
22. I am thankful that I am …
23. I believe an employer would find me …
24. As I have grown older, I have developed my ability to …
25. A difficult situation that I handled very well was …
26. In my last job, I was most appreciated for my …
27. I have strong beliefs about …
28. One of my most thrilling experiences was …
29. People say I can be counted on to …
30. I have always wanted to be …
31. I enjoy thinking about …
32. I enjoy learning about …
33. I enjoy making …
34. I believe that I am here on earth to …
35. My creativity shines when I …
36. I feel passionate about …
37. I am inspired by …
38. Three words that best describe me are …
39. I handle stress best by …
40. I would describe my management style as …
41. My ideal boss would be someone who …
42. One of the biggest mistakes I have ever made was …

This Certifies that the very special and awesome

_____

has successfully completed
a workshop entitled
"You're Special - Know Your Worth"
December, 2001

Presenters:
Denise Woznesensky,
Engaging the Labour Market
Virginia Battiste,
Whitewood Action for Families

Sponsored by The Whitewood
Women's Network
and PLAR
(Prior Learning & Assessment Recognition)

APPENDIX VI

University of Regina, Counselling Services: Sample Portfolio Development Materials

University of Regina Counselling Services has developed various materials for promoting portfolio development to post-secondary students. Examples of a workshop flyer, the promotional bookmark and Building Your Portfolio Handout are included in the appendix.

An eye-catching poster titled "Building your Portfolio" was created to increase awareness of the portfolio and its applications for students in all areas of study. The document, "Exploring Your Options at the University of Regina" was developed to provide a brief overview of the potential knowledge, skills and opportunities for each faculty and program offered at the U of R. Also developed was a pilot handbook "Building Your Portfolio: A Step-By-Step Guide." Revisions of this handbook are underway, and the updated version will be available May 2003.

Copies of these materials are available by mail or pick up at:

Counselling Services
251 Riddell Centre
University of Regina
Regina, Saskatchewan
Canada S4S 0A2
Ph: 306-585-4491
Fax: 306-585-5172
Web site: www.uregina.ca/counselling

UNIVERSITY OF REGINA

Student Affairs

Portfolio Development Services for Students

To assist students in recognizing and valuing their learning at the U of Regina from the first semester to the last and onward along a lifelong continuum. Ultimately, to enable students to clearly conceptualize their learning and, thus, more fully realize their potential.

Objectives

- To highlight the portfolio as a valuable tool for educational and career development for students in all programs, faculties and years of study.
- To provide information on the pilot project to develop portfolio services at the U of Regina.
- To provide information on the services of *Prior Learning Assessment and Recognition* (PLAR).

Agenda

A. Introduction to *Prior Learning ~~and~~ Assessment Recognition* (PLAR)
An overview of PLAR.
- Presenter: Marlene Brooks, PLAR Services Project

B. Advising Students on Portfolio Development Services
A review of portfolio initiatives underway and upcoming.
Presenters:
- Linda O'Halloran, Manager, Co-operative Education and Student Employment Services
- Kevin Bolen, Assistant Manager, Student Employment Services and Co-operative Education
- Susan McKay, Counsellor, Counselling Services

C. The Portfolio as a Multipurpose Life Tool
Tailoring portfolios for different educational and career goals.
- Presenter: Marlene Brooks, PLAR Services Project

Participants: This session will be of interest to advisors, counsellors, faculty and other staff who provide educational and career information and counselling to students.

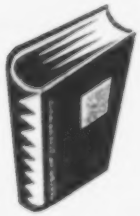
Date: Friday, August 17, 2001
Place: Riddell Centre 285
Time: 9:00 a.m. – 12 noon

Registration: No fee. To register contact Student Affairs—585-4743 or gina.benz@uregina.ca

Join us!

Counselling Services in co-operation with PLAR has received funding for this initiative from Post-Secondary Education and Skills Training.

BUILDING YOUR



PORTFOLIO

For Students in
All Programs & Years

A portfolio is a tool *for...*

- Collecting evidence of your knowledge, skills and attributes (e.g., reports, essays, photos)
- Documenting learning in and out of class (e.g., volunteering)
- Making informed decisions for education, career and life
- Supporting applications for academic credit based on prior learning (e.g., at work)
- Backing up your resume in employment interviews

For portfolio assistance contact

Counselling Services
251 Riddell Centre 585-4491
www.uregina.ca/counselling

UNIVERSITY OF REGINA

Get a step up on the competition!

Ace Your Interview
with a

PORTFOLIO

- Employment Portfolios
- Skills Assessment
- Resume Preparation
- Office Orientation
- Interview Skills
- Job Searching

For individual assistance and workshops contact

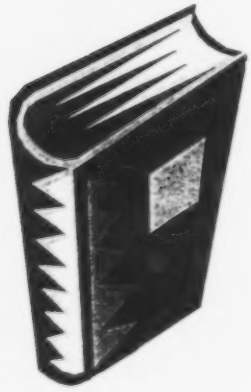
Student
Employment
Services

163 Riddell Centre 585-5161
www.uregina.ca/ses

UNIVERSITY OF REGINA

UNIVERSITY OF REGINA

Building Your Portfolio



Information for Students in All Programs & Years

A portfolio is a multipurpose tool for...

University of Regina Counselling Services
Saskatchewan Labour Force Development Board - PLAR Services Project
2003

- Collecting evidence of your knowledge, skills and attributes (e.g., reports, essays, photos)
- Documenting your learning in and out of class (e.g., volunteering)
- Making informed decisions about your educational, career and life direction
- Supporting applications for academic credit based on prior learning (e.g., at work)
- Backing up your resume in employment interviews

Portfolio Basics

So what is a portfolio?

In short, a portfolio is a collection of evidence or artifacts that demonstrates your knowledge, skills and personal attributes—for example, reports, essays, letters, certificates and photographs.

Lexicographically, *port* = to carry and *folio* = leaves and sheets of paper. In other words, a portfolio is "a receptacle or case for keeping loose sheets of paper, prints, drawings, maps, music or the like...." (*Oxford English Dictionary*).

Broadening its application, today a portfolio takes varied forms—a binder, CD-ROM or file box, for example—and can contain a breadth of artifacts that serves as evidence of your knowledge, skills and personal qualities. As such, a portfolio can be an asset for any student.

A portfolio is for all students?

Yes, building a portfolio can benefit any student who wants to clearly identify and conceptualize his or her learning, whether acquired in class or outside, for example, through volunteer or paid work.

For example, a student could include an essay or lab report in a portfolio as evidence of: a) knowledge on a topic; b) ability to research, analyze, problem solve and write; and c) personal attributes of diligence and attention to detail.

What's the difference between a "comprehensive" and "specialized" portfolio?

A "comprehensive" portfolio is a collection of all your artifacts systematically organized under a broad range of categories and headings (e.g., computer skills, lab analyses, public relations).

To develop a comprehensive portfolio, artifacts are often collected in a binder using plastic protector sheets, which allow new material to be easily added. Artifacts can later be selected

from the comprehensive portfolio to develop tailored or "specialized" portfolios as needed for specific purposes—for example, to present in an interview for employment or application for academic credit.

What are the benefits of building a portfolio?

First of all, creating a portfolio requires you to clearly identity your knowledge, skills and attributes, which you might otherwise overlook. In doing so, many people find that developing a portfolio, thus, helps build self-esteem and self-confidence by better recognizing and valuing their strengths and accomplishments.

Secondly, if you decide to pursue a new educational or career direction, a portfolio can be a powerful tool for showcasing your strengths to others, such as an examiner or potential employer, and transferring your knowledge, skills and attributes to a new area.

In sum, a portfolio can be an empowering and a powerful multipurpose tool for opening the door to many new opportunities!

A multipurpose tool?

Yes, a portfolio is a flexible tool that can be used for varied purposes:

- Record your learning history
- Apply for academic credit at a post-secondary institution
- Improve employment marketability
- Apply for occupational and professional certification
- Support performance appraisal and promotion
- Validate knowledge and skills acquired outside Canada
- Promote personal and professional development
- Make informed educational, career and life decisions
- Facilitate lifelong learning

The 4-Step Portfolio

Step 1: Collection & Reflection

A. Begin to gather evidence of your learning—for example, essays, lab reports, projects, artwork, letters of validation, awards, certificates, recordings, transcripts.

B. Include artifacts from different types of learning experiences:
   - Formal: structured, institutional (e.g., high school & post-secondary studies)
   - Non-Formal: structured, non-institutional (e.g., conflict management workshop, CPR First Aid, workplace seminars)

- Informal: volunteer work, employment, recreational activities, family and life events (e.g., community development, teamwork, childcare)

C. Reflect upon each artifact and describe your learning in terms of:
   - Knowledge (e.g., research methods, computer skills, teaching)
   - Skills (e.g., analyzed, assessed, developed, solved, presented)
   - Attributes (e.g., diligent, efficient, organized, enthusiastic)

D. Continue to collect evidence and reflect upon your learning.

Step 2: Organization & Design

A. Select an overall system of organization:
   - Chronological: materials organized by date
   - Thematic or Functional: materials organized by theme
     (e.g., technical, design, presentation, professional development, certificates)

B. Select your preferred design elements (e.g., layout, font, graphics).

Step 3: Assembly

A. Develop a comprehensive portfolio by systematically organizing and filing evidence in appropriate categories (e.g., writing, computers, research, teaching, administration).
B. Use a checklist to ensure that you have included all the portfolio elements.
C. Return to reflecting upon each artifact to determine its purpose and value.
D. Modify and expand your comprehensive portfolio as needed.
E. Select artifacts from your comprehensive portfolio to develop specialized portfolios (e.g., for educational or job interviews).

Step 4: Presentation

A. Be informed about your audience. Will the interviewer know what is a portfolio?
B. Practice how you will present your portfolio while keeping the focus on you.
C. Prepare for follow-up questions.
D. Modify your presentation as needed.

APPENDIX VII

University of Saskatchewan, College of Nursing
Overview of Materials Developed

An information package has been developed which refers students to the University Challenge for Credit Policy for Prior Learning Assessment and Recognition, outlines what PLAR is (and is not), and identifies who is eligible for PLAR, and the course that is available for challenge in the Post-Registration BSN Program. The process to be followed in pursuing the course for challenge in the program is outlined. As well, a course description, the required textbooks for those registered in the course, overall course learning outcomes, and learning outcomes for each unit in the course are provided.